1 R277. Education, Administration.

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- 2 R277-469. Instructional Materials Commission Operating Procedures.
- 3 **R277-469-[2]1.** Authority and Purpose.
- 4 [A.](1) This rule is authorized [under] by:
- 5 (a) Utah Constitutional Article X, Section 3, which vests general control and supervision over public education in the Board[, by];
  - (b) Section 53A-1-401, which allows the Board to make rules to execute the Board's duties and responsibilities under the Utah Constitution and state law;
  - (c) Section 53A-14-101, which directs the Board to appoint an Instructional Materials Commission and directs the Commission to evaluate instructional materials for recommendation by the Board[, by]; and
  - (d) Section 53A-14-107, which directs the Board to make rules that establish the qualifications of the independent parties who may evaluate and map the alignment of the primary instructional materials and requirements for the detailed summary of the evaluation [and its placement on a public website, and by Section 53A-1-401(3) which allows the Board to make rules in accordance with its responsibilities].
  - [B.](2) The purpose of this rule is to:
  - (a) provide definitions, operating procedures and criteria for recommending instructional materials for use in Utah public schools[-];
  - (b) [The rule also] provide[s] for mapping and alignment of primary instructional materials to the Core consistent with Utah law[-]; and
  - (c) provide rules for purchase and distribution of instructional materials within the state.

## R277-469-[<del>1</del>]2. Definitions.

[A. "Advanced placement materials" means materials used for the College Board Advanced Placement Program and classes. The program policies are determined by representatives of member institutions. Operational services are provided by the Educational Testing Service. The program provides practical descriptions of college-level courses to interested schools and student test results based on these courses to colleges

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analytical and conceptual skills and aesthetic understanding for advanced students.]

- (10) "LEA" includes, for purposes of this rule, the Utah Schools for the Deaf and the Blind.
- (11) "Mapping" means creating a visual representation listing topics in instructional materials in correlation to the standards of the Utah core.

[\(\text{L:]}\)(12) "National Instructional Materials Access Center\) or [\(\frac{1}{2}\) "NIMAC[\)]" [is a central national repository established at the American Printing House for the Blind (APH) to store and to maintain NIMAS file sets. It features an automated system for allowing publishers to deposit NIMAS-conformant files within the repository. Files are checked at the Utah State Instructional Materials Access Center (USIMAC), as defined in R277-469-1S, to confirm that they are valid NIMAS-conformant files and then cataloged in a web-based database. Those who have been authorized for access have user identifications and passwords. These authorized users may search the NIMAC database and directly download the file(s) they need to convert into accessible instructional materials for those students who are in elementary and secondary schools and have qualifying disabilities.] means the same as that term is defined in Subsection R277-800-2(14).

[M-](13) "National Instructional Materials Accessibility Standard" or [(]"NIMAS[)]" [is a technical standard used by publishers to produce consistent and valid XML-based source files that may be used to develop multiple specialized formats, such as Braille, large print, digital, or audio books, for students with print disabilities.] means the same as that term is defined in Subsection R277-800-2(15).

[N. "Not recommended materials" means instructional materials which have been reviewed by the Commission but not recommended.]

- (14) "Not sampled" means instructional materials that were included in a publisher bid for evaluation by the Instructional Materials Commission, but which were not sampled to the Superintendent or the Commission.
- [O:](15) "Primary instructional material" means a comprehensive basal or Core textbook or integrated instructional program for which a publisher seeks a recommendation for Core subjects designated in Sections R277-700-4[, 5, and 6] through R277-700-6.
- [P. "Public website" means a website designated by the USOE provided by the publisher of instructional materials, free-of-charge, to teachers and the general public, to

exhibit alignment and mapping to the Core for Utah primary instructional materials.]
[ <del>Q.</del> ](16) "Recommended instructional materials" or "[(]RIMs[)]" means the
recommended instructional materials searchable database provided as a free service by
the [ $\overline{\text{USOE}}$ ] $\underline{\text{Board}}$ for the posting of evaluations and alignments to the Core of instructional
$materials \ submitted \ by \ publishers \ [ {\color{red} and \ on \ the \ public \ website \ of \ the \ publisher, \ if \ applicable,} ]$
for review by the Commission and approval of the Board.
(17) "Recommended limited" means instructional materials that are in limited
alignment with the Core requirements or are narrow or restricted in their scope and
sequence.
(18) "Recommended primary" means instructional materials that:
(a) are in alignment with content, philosophy, and instructional strategies of the
Core;
(b) have been mapped and aligned to the Core, consistent with Section 53A-14-107;
(c) are appropriate for use by students as principal sources of study; and
(d) support Core requirements.
(19) "Recommended student resource" means instructional materials aligned to the
$\underline{\text{Core that are developmentally appropriate, but not intended to be the primary instructional}}\\$
resource, which may provided valuable content information for students.
(20) "Recommended teacher resource" means instructional materials that are
appropriate as resource materials for use by teachers.
(21) "Reviewed, but not recommended" means instructional materials that an LEA
is strongly cautioned against using because the materials:
(a) do not align with the Core;
(b) are inaccurate in content;
(c) include misleading connotations;
(d) contain undesirable presentation; or
(e) are in conflict with existing law or rule.
[R. "State Core Curriculum (Core)" means minimum academic standards provided
through courses as established by the Board which shall be completed by all students K-12

as a requisite for graduation from Utah's secondary schools. The Core is provided in

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150	<del>R277-700.</del> ]	
151	[ <del>S.</del> ](22) "Utah State Instructional Materials Access Center <u>" or "[</u> (]USIMAC[ <del>)</del> ]" [ <del>is</del>	<del>з а</del>
152	center that receives NIMAS electronic file sets and produces them in the accessit	ole
153	alternate format required by students with print disabilities] means the same as that te	rm
154	is defined in Subsection R277-800-2(21).	
155	[T. "USOE" means the Utah State Office of Education.]	
156	R277-469-3. Use of State Funds for Instructional Materials.	
157	[A. School districts may use funds:]	
158	(1) An LEA may use state funds for any primary supplemental or supporti	ive
159	instructional materials that support Core requirements.	
160	(2) An LEA may select and approve [for] instructional materials [selected a	nd
161	approved by a school or school district] consistent with:	
162	(a) the standards of this [rule] R277-469; [and:]	
163	([a]b) [consistent with] established local board procedures and timelines; [and]	
164	([ <del>b</del> ]c) [ <del>consistent with</del> ] S <u>ubs</u> ection 53A-13-101(1)(c)(iii); [ <del>or</del> ] and	
165	([c]d) [ <del>consistent with</del> ] Subsection 53A-14-102(4).	
166	[B-](3) A [S]school[s] or school district[s] that uses any funding source to purcha	se
167	materials that have not been recommended or selected consistent with state law, m	ay
168	have funds withheld to the extent of the actual costs of those materials pursuant	to
169	S <u>ubs</u> ection 53A-1-401[ <del>(3)</del> ] <u>(8)(a)(ii)</u> .	
170	[C. Free instructional materials:]	
171	([1]3)(a) An LEA may use free instructional materials that are used as prima	ary
172	instructional materials or that are part of primary integrated instructional programs [sh	<del>ial</del> l
173	be] subject to the same independent party evaluation and Core mapping as basal or Co	ore
174	material[ <del>; or</del> ].	
175	([2]b) [if] If an LEA receives free materials [are provided] as part of a supplemen	ıtal
176	program, the[y] <u>LEA</u> may [be] use[d] the materials as student instructional materials or	nly
177	consistent with the law and this [rule; and]R277-469.	
178	[(3) shall be reviewed and recommended by the Commission or by a school ir	<del>т а</del>

179 public meeting consistent with Section 53A-14-102(4), prior to their use.

- D. Charter schools are exempt from Section 53A-14-107. Despite this exemption and consistent 34 CFR 300.172(c), hereby incorporated by reference, all public schools subject to a state education agency that contracts with NIMAC require publishers with whom the public schools under the control of the state education agency contract to prepare and, on or before delivery of the print instructional materials, provide to NIMAC electronic files containing the contents of the print instruction materials using the NIMAS or purchase instructional materials from the publisher that are produced in, or may be rendered in, specialized formats.]
- (4) An LEA shall include a requirement in all publisher contracts for instructional materials that the publisher shall:
- (a) prepare and provide electronic files of all instructional materials in the NIMAS format to NIMAC on or before delivery of print instructional materials; or
- (b) provide instructional materials that are produced in, or may be rendered in, specialized formats.

[E. Notice to publishers]

- ([1]5)(a) [All traditional and charter public schools shall be responsible for notifying]

  An LEA shall provide timely notice to all publishers with whom the [y] LEA contracts for instructional materials [beginning October 1, 2008] that all materials shall be provided consistent with [R277-469-3D] Subsection (4).
- ([2]b) [Traditional and charter schools] An LEA's notice shall include a copy of this R277-469[, drawing publishers' attention to this provision of the rule, with the notice to publishers from whom the schools purchase materials.
- 202 (3) Schools shall provide publishers with timely notice of this requirement].

## R277-469-4. Instructional Materials Commission Members Terms of Service.

- [A.](1) [Members shall be appointed from categories designated in] The Board shall appoint members of the Instructional Materials Commission in accordance with Section 53A-14-101.
  - [B:](2)(a) A [M]member[s] appointed in accordance with Subsection (1) [of the

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208	Commission] shall serve four year terms, staggered to ensure continuity in the efficient
209	operation of the Commission.
210	(b) A [₩]member[s] may apply for reappointment [for] to one additional term.
211	[C-](3) The Commission may establish subcommittees as needed.
212	R277-469-5. Commission Review of Materials.
213	[A.](1) The Instructional Materials Commission shall primarily [The primary] focus
214	[ <del>of instructional materials</del> ] <u>on reviewing</u> [ <del>shall be</del> ] materials used in subjects aligned with
215	Core requirements to include reading, language arts, mathematics through geometry
216	science, in grades 4 through 12, and effectiveness of written expression, and other Core
217	subject areas as assigned by the Board.
218	[B.](2) The Commission shall determine [S]subject areas and timelines for review
219	[ <del>shall be determined by the Commission</del> ] based on school district <u>and charter school</u> needs
220	and requests, [and] using forms and procedures provided by the [USOE] Superintendent
221	[C. Commission review of material takes place at least annually.]
222	(3) The Commission shall meet to review materials at least semi-annually.
223	[R277-469-6. Review and Adoption Categories.
224	Materials may be considered for review by the Commission and designated under
225	the following categories. They may be purchased with state funds and used consisten
226	with this rule:
227	(4) Following its evaluation of a submitted item, the Commission [may]shall
228	recommend that the Board classify materials in one of the following categories:
229	(a) Recommended primary;
230	(b) Recommended limited;
231	(c) Recommended teacher resource;
232	(d) Recommended student resource;
233	(e) Reviewed, but not recommended; or
234	(f) Not sampled.
235	[A. Recommended Primary: Instructional materials that:
236	——— (1) are in alignment with content philosophy and instructional strategies of the

([2]b) [if used as primary materials, be] are mapped and aligned to the Core

([1]a) [be] are consistent with Core requirements [or both];

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266	[consistent with Section 53A-14-107] and state adopted assessments [as applicable for the
267	2012-2013 school year] if planned for use as primary materials;
268	([3]c) [be] are high quality, research-based, and proven to be effective in supportin
269	student learning;
270	([4]d) provide an objective and balanced viewpoint on issues;
271	([5]e) include enrichment and extension possibilities;
272	([6]f) [be] are appropriate to varying levels of learning;
273	([ <del>7</del> ]g) [ <del>be</del> ] <u>are</u> accurate and factual;
274	([ <del>8]h</del> ) [ <del>be</del> ] <u>are arranged chronologically or systematically, or both;</u>
275	$([9]\underline{i})$ reflect the pluralistic character and culture of the American people and provid
276	accurate representation of diverse ethnic groups;
277	([ <del>10</del> ]j) [ <del>be</del> ] <u>are</u> free from sexual, ethnic, age, gender or disability bias an
278	stereotyping; and
279	([ <del>11</del> ]k) [ <del>be</del> ] <u>are</u> of acceptable technical quality.
280	[ <del>B.</del> ](2) <u>A [</u> P]publisher[ <del>s</del> ], when submitting new primary material to be evaluated b
281	the [ <del>USOE</del> ] <u>Superintendent</u> , shall submit an electronic version <u>of that material</u> in NIMA
282	file format [of that material] to [the National Instructional Materials Access Cente
283	(]NIMAC[) for use in conversion into Braille, large print, and other formats for students wit
284	print disabilities.
285	[ <del>C. USOE review:</del> ]
286	([ <del>1</del> ]3) The [ <del>USOE</del> ] <u>Superintendent</u> may require a <u>n</u> [ <del>school district</del> ] <u>LEA</u> to provid
287	a report of instructional materials purchased by the [school district] <u>LEA</u> or a school in th
288	previous five years.
289	([ <del>2]4</del> ) The [ <del>USOE</del> ] <u>Superintendent</u> may initiate a formal or informal audit of

R277-469-[8]7. Agreements and Procedures for [School Districts] LEAs.

consistent with the law or this rule.

[A.](1) A local board shall establish a policy for [school district and school] selection and purchase of instructional materials.

instructional materials purchased to determine purchase or use of instructional materials

[B.](2) As part of any materials adoption process or procurement contract for the
purpose of purchasing instructional materials, an LEA shall provide instructional materials
to all students, including blind students and other students with disabilities, in a timely
manner.

- ([1]a) A publisher may provide materials in electronic files to NIMAC to make materials available to eligible students.
- ([2]b) An LEA[s] shall include NIMAS contract language in all contracts with publishers for Core materials.
- ([3]c) An LEA[s] may purchase instructional materials from the publisher that are produced in, or may be rendered in, specialized formats for eligible students.
- [C.](3) An LEA shall require a [The] detailed Core curriculum alignment [shall be required] prior to the purchase of primary instructional materials [by public schools and school districts purchased for the 2012-2013 school year].

## R277-469-[9]8. Qualifications for Core Curriculum Alignment Independent Parties.

[Independent parties required to meet mapping and alignment requirements for the 2012-2013 school year shall use reviewer(s)/employee(s) who meet the following minimum requirements:]

- (1) A primary instructional materials provider shall contract with an independent party in accordance with Subsection 53A-14-107(1)(a).
- (2) An independent party may only employ or contract with a reviewer who has [(1) have] a degree or an endorsement specific to the subject area of the primary instructional materials. [For example, a reviewer who is aligning an American literature text shall have an English endorsement or degree; a reviewer who is mapping a calculus text shall have a mathematics endorsement or a related mathematics degree. The USOE shall make available to independent parties a list of acceptable endorsements or degrees that shall be current and valid for appropriate review of materials; and
- (2) shall post documentation of credentials and endorsements on a public website designated by the USOE as required under Section 53A-14-107(3)(b).]
  - (3) A publisher shall provide proof of an independent party's credentials to the

325 <u>Superintendent upon request.</u>

326	R277-469-[ <del>10</del> ]9. Detailed Summary Requirements.
327	[Independent parties required to meet mapping and alignment requirements for the
328	2012-2013 school year shall provide to the publisher a detailed summary of the evaluation.
329	The summary shall:
330	A. be provided on a public website required under Section 53A-14-107(3)(b)
331	designated by the USOE;]
332	(1) An independent party shall submit a summary required under Subsection 53A-
333	14-107(1)(b) in a searchable, software database format designated by the Superintendent.
334	[B. submit the summary in the alignment template provided by the USOE;
335	C. submit the summary in a searchable, software database format designated by
336	the USOE;]
337	[D-](2) A summary required under Subsection 53A-14-107(1)(b) shall:
338	(a) include detailed alignment information that includes, at a minimum:
339	([ <del>1</del> ] <u>i</u> ) the title of the material;
340	([ <del>2</del> ] <u>ii</u> ) the ISBN number;
341	([3] <u>iii</u> ) the publisher's name;
342	([4]iv) the name[f] and grade of the Core document used to align the material;
343	([5]v) the overall percentage of coverage of the Core;
344	([6]vi) the overall percentage of coverage in ancillary resources of the material to the
345	Core;
346	([7]vii) the percentage of coverage of the Core in the material for each standard,
347	objective and indicator in the Core with corresponding page numbers;
348	([8]viii) percentage of coverage of the Core not covered in the material but covered
349	in the ancillary resources for each standard; and
350	([9]ix) objective and indicator in the Core with corresponding page numbers or
351	URLs; and
352	[E-](b) provide the detailed alignment information listed in [R277-469-10D(4)]
353	Subsection (a)(iv) for the student text for all editions of the text that are used in Utah public

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354	schools;	
355	[ <del>F.</del> ](c) provide the detailed alignment information listed in [ <del>R277-464-10D</del> 6	<del>(4)</del> ]
356	Subsection (a)(iv) for a teacher edition of text, if a teacher edition is used in Utah pul	blic
357	schools; and	
358	[G. designate at the conclusion of the alignment document, the reviewer's evaluat	<del>io</del> n
359	of the material's alignment to the Core curriculum on a scale of 1-10, with 10 indicating	the
360	closest alignment to the Utah Core curriculum; and]	
361	[ <del>H.</del> ](d) provide an assurance, including a personal [ <del>(electronic is adequa</del>	<del>te)</del> ]
362	signature, that the work was completed personally and as required by the licensed a	and
363	endorsed reviewer.	
364	R277-469-1[ <del>1</del> ] <u>0</u> . Agreements and Procedures for [ <del>Publishing Companies</del> ] <u>Publishe</u>	ers.
365	[A.](1) [Beginning with the 2012-2013 school year, publishing companies] A publish	her
366	desiring to sell primary instructional materials to Utah school districts [and schools] sl	nall
367	comply with the requirements of Section 53A-14-107 and this R277-469.[+	
368	(1) contract with an independent party who meets the requirements in R277-46	<del>9-9</del>
369	to align and map the primary instructional material and related ancillary materials to	the
370	appropriate Utah Core with the following provisions:	
371	(a) the publisher provides a detailed summary of the Core alignment and mapp	ing
372	as described in R277-469-10 at no charge; and	
373	(b) the publisher pays the costs associated with the requirements of Section 53A-	<del>14-</del>
374	<del>107.</del>	
375	(2) The requirements under R277-469-9-A(1) shall only be performed by entit	<del>ies</del>
376	consistent with Section 53A-14-107(2).]	
377	[ <del>B.</del> ](2)(a) A [ <del>Publishers</del> ] <u>publisher</u> seeking to sell recommended materials to U	tah
378	schools or school districts shall have [a classroom set of at least 30]10 [all] books a	and
379	tangible adopted materials or such [greater]other amount as required by a deposit	ory
380	based on anticipated need on deposit within the state at an instructional material	ials
381	depository in the business of selling instructional materials to schools or school districts	s in
382	Utah.	

- (b) A publisher shall submit verification of compliance with Subsection (2)(a) to the Superintendent through the publisher's contracted depository prior to the Superintendent posting a review of the materials on RIMs.
- [C.](3) A publisher may make a [Đ]depository agreement[s] [may be made between publishers of materials and] with one or more depository.
- [<del>D.</del>](4) <u>Notwithstanding</u> [<u>T]the provisions of [<del>R277-469-11 shall not preclude publishers from</del>] <u>Subsection (2), a publisher may sell[<del>ing</del>] instructional materials to schools or school districts in Utah directly or through means other than [the] <u>a</u> designated depository.</u></u>
- (5) A publisher need not store [Đ]digital and online resources [do not require storage in a depository] within the state, but shall guarantee timely resource availability of a placed order and shall [be] provide[d] digital and online resource orders without shipping charges.
- [E. Comparable materials shall be prepared for students with disabilities in a timely manner.
- F. Recommended materials with revisions:]
- ([1]6) If a revised edition of recommended materials retains the original title and authorship, the publisher may request its substitution for the edition currently recommended providing that:
- (a) the original contract price and contract date do not change and the original contract price applies for the substituted materials;
- (b) the revised edition is compatible with the earlier edition, permitting use of either or both in the same classroom;
- (c) a sample copy of the revised edition is provided to the [USOE Instructional Materials Specialist] Superintendent for examination purposes; and
- (d) the publisher submits a revised electronic edition in NIMAS file format to the [National Instructional Materials Access Center (]NIMAC[)] if the [USOE] Superintendent approves the substitution request[; and].
- ([2]7) The Commission shall make the final determination about the substitution of a new edition for a previously recommended edition with assistance from the [state subject area specialist] Superintendent.

[G.](8) A publisher's contract price for materials recommended by the Commission and the Board shall apply for five years from the contract date.

## R277-469-1[2]1. Request for Reconsideration of Recommendation.

- [A. A request for reconsideration is an additional opportunity provided to a school district, school or publisher for review of instructional materials when the school district, school or the publisher disagrees with the initial Commission recommendation.
- B. The request for reconsideration procedure is as follows:
- (1) <u>The Superintendent shall provide [A] a school district, school or publisher [shall receive] with the evaluations and recommendations resulting from the [USOE of the] initial review of the Commission.</u>
- (2) A school district, school or publisher [shall have 30 days to respond to the evaluation and] may, within 30 days of the Commission's initial recommendation, request to have materials reviewed again during the Commission's next review cycle.
- (3)(a) During the period of the reconsideration request, the Superintendent shall classify materials [shall be marked as tentative and shall not be given official status] only tentatively.
- (b) [These] The Superintendent shall not post tentatively classified materials [shall not be posted] to [the Internet site] RIMs until recommended through the official Commission process.
- (4) A school district, school or publisher may be asked to send a second set of sample materials to the [USOE] Superintendent as part of a reconsideration request.
- (5) Any written information provided by a school district, school or publisher shall be available to the advisory committees during the second review.
- (6) After the second review by the subject area advisory committee, the Commission shall vote on the advisory committee's recommendation [shall be voted on by the Commission] at the next scheduled meeting.
- (7) If the Commission votes to change the recommendation, the Superintendent shall notify the Board [shall be notified] of the action at the next scheduled Board meeting.
  - (8) The Superintendent shall send [A] a school district, school or publisher [shall

Revision 1 - Blue **Revision 2** Revision 2 - [Red] and Green October 13, 2017 442 receive] written notification of the final recommendation and [shall receive a copy of the] 443 new evaluation. [Evaluations may appear on the Internet if materials are recommended.] 444 (9) If the Commission and Board approve materials following a request for 445 reconsideration, the Superintendent shall post the evaluation to RIMs. 446 **KEY:** instructional materials 447 Date of Enactment or Last Substantive Amendment: [June 7, 2013]2018 448 Notice of Continuation: [April 8, 2013]2017 449 Authorizing, and Implemented or Interpreted Law: Art X, Sec 3; 53A-14-101; 53A-14-450 107; 53A-1-401[<del>(3)</del>]